Navigation Training

Agenda

- New eMM Overview
- Login Screen
- Homepage
- Header Bar
- Navigation Bar
- Document Navigation

New eMaryland Marketplace Overview

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**Overview –
New eMaryland Marketplace**

Statewide Online eProcurement System

- BuySpeed – Off-the-shelf public procurement system
  - Used by public entities across the U.S.
  - Managed by Periscope
- Phase I – Replace current eMM system
  - Vendor registration and management
  - Solicitation and statewide contract management
- Phase II – Statewide contract ordering
  - Integration with FMIS / ADPICS
  - Release Requisitions and PO support

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The new eMaryland Marketplace is a web-based application, meaning that its accessed by connecting to the internet and going to its web address.

Overview – Terminology

Term	The new eMaryland Marketplace Term
Solicitation (all types)	Bid
Responses (all types), including Proposals, Bids, Offers, etc	Quote
Term Contract	Blanket Purchase Order

The new eMaryland Marketplace uses different terminology than you may be used to. The table displays some common terms and what they are named within the new eMaryland Marketplace.

eMM Role	Primary Functions	Personnel
Basic Purchasing (BP)	• Process requisitions • Conduct solicitations • Manage contracts • Cut purchase orders	• Procurement
Department Access (DA)	**Optional** • Create requisitions • Approve documents • Receive items • Solicit and/or document informal price quotes • Cut limited dollar purchase orders	• End-users (Customers) • Approvers • Business Managers
Inquiry	• Review procurement and system data • No ability to create or modify documents	• Auditors • Management
Organization Administrator	• Manage agency users • Manage approvals • Manage agency business units and addresses • Manage procurement documents and workflow	• Procurement Management
Internal Administrator	• Manage system settings • Manage vendor settings • Manage organization access	• DGS
Seller	• Respond to solicitation opportunities • Acknowledge received purchase orders	• Vendors
Seller Administrator	• Manage vendor users (Sellers)	• Vendors

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Every user with login access to The new eMaryland Marketplace must have at least one role. Roles determine the purchasing and administrative functions a user is able to access. The table displays the different roles available within The new eMaryland Marketplace, their functions and the personnel that generally hold them.

A more thorough explanation of each role is provided in the **Detailed Definitions** handout.

Document Type	Purpose	Created By
Bid	• Conduct formal and informal solicitations • Create and publish solicitation amendments • Close response period • Access the **Bid Tabulation (Bid Tab)** document	• Basic Purchasing
Bid Tab	• View and evaluate solicitation responses • Request clarifications and revisions to responses • Recommend vendors for award • Convert awards to purchase orders and contracts	• Basic Purchasing (automatically created by closing response period)
Quote	• Respond to a solicitation	• Seller
Purchase Order (PO)	• Send orders to vendors • Setup and manage term contracts	• Basic Purchasing
Change Order	• Manage change orders and contract amendments • Access via Purchase Order	• Basic Purchasing

The documents within The new eMaryland Marketplace are used to conduct procurement activity. Users must create and submit documents in order to request items, conduct solicitations, establish contracts and order and receive items. The table displays the various documents that can be created and describes who can create them and what functions they support. Note that no administrative roles have the ability to create documents. In order to conduct purchasing activity, a user must have either the Department Access or Basic Purchasing role.

Status Name	Meaning	Available Actions	Actions Permitted By
In Progress	The initial status of new documents. The document is still being completed by the creator.	• Edit • Submit for Approval • Clone (creates a new copy of the document) • Cancel	• Creator • Authorized users
Ready for Approval	The document has been submitted for approval and is travelling down an approval path.	• Approval/Disapproval • Edit (accounting and commodity code information only) • Clone • Cancel	• Current approver
Returned	The document was disapproved by an approver.	• Reopen (returns document to "In Progress" status) • Clone • Cancel	• Creator • Authorized users
Ready to Send	The document has been approved and is ready to be sent to a vendor or vendors.	• Send to vendor • Clone • Cancel	• Creator • Authorized users
Sent	The document has been sent to a vendor or vendors.	• Clone • Cancel	• Creator • Authorized users
Cancelled	The document has been cancelled by the creator or an authorized user for the document's business units.	• Clone	• Creator • Authorized users

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As documents are processed to conduct procurement activity, their status changes in order to allow/disallow various functions associated with the document. Depending on the status of a document, it may become accessible and/or editable to only specific users. When documents require the action of a specific user, an email is automatically sent to that user to alert them.

The table lists the most common statuses for the new eMaryland Marketplace documents and describes what each means, what actions are permissible at that status and which users can perform those actions.

Login Screen

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Login Screen – Overview

Upon accessing the new eMaryland Marketplace you will be taken to the Login Screen. In addition to allowing registered users to login, this screen provides the following links:

• **Register** allows users to register as a vendor within the system so that they can receive notice of and respond to Bid opportunities, and can be awarded Purchase Orders

• **Complete Registration** allows vendors that did not complete the registration process to pick-up where they left off

• **Open Bids** allows registered and unregistered users to view a list of open solicitation opportunities and to sort them by commodity categories

• **Active Contracts** allows registered and unregistered users to view a complete list of all active contracts for agencies using the system and to sort them by commodity categories

• **Contract & Bid Search** allows registered and unregistered users to browse and search for specific open solicitation opportunities, active contracts and their associated solicitations

Clicking the **Open Bids** link displays a screen on which all published Open Bids are listed by published date, starting with the most recent. Open Bids are those where the Basic Purchasing user has allowed any vendor to submit a reply, not just those notified when the Bid was published.

The list can be narrowed by selecting a commodity category in the **Show Bids for Category** dropdown and selecting **Go**. Clicking on the link in the **Bid #** column will display the Bid.

Throughout The new eMaryland Marketplace you will encounter screens, like the Open Bids screen, which feature a button labeled **Exit**. Selecting this button will take you back to the previous screen. Selecting the **Exit** button from this screen will take the user back to the Login Screen.

It is highly recommended that you utilize the **Exit** button available within The new eMaryland Marketplace instead of your internet browser's **Back** button, because you may produce system errors if you click **Back** after you've saved data or performed certain actions within the system. On screens where going back to the previous screen is permissible, an **Exit**, **Save & Exit**, or **Cancel & Exit** button will be available.

eMaryland Marketplace

Login Screen – Active Contracts

Active Contracts

Show Contracts for Category [Food, Equipment, and Related Services ▼] [Go]

Contract/Blanket #	Bid #	Description	Vendor Name	Type Code	Begin Date	End Date
DES090035-1		Cafeteria and Kitchen Equipment (Including Food Service Equipment)	Standard Industries		08/01/2009	07/31/2010
SCC060003-A1-1-A18		Paper, Plastics, Liners, Janitorial Supplies and Equipment	Waxie Sanitary Supply		03/01/2009	02/16/2011
SCC080005-1-A1		Food Products	Schade Distributing		06/01/2008	05/31/2010
SCC080005-2-A1		Food Products	Shamrock Foods-Dairy Division		06/01/2008	05/31/2010

[Exit]

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Clicking the **Active Contracts** link displays all currently active Contract and Blanket Purchase Orders in descending order by Contract/Blanket #. Active Contracts are those in "Sent" status that are currently within their Begin and End dates.

The list can be narrowed by selecting a commodity category in the **Show Contracts for Category** dropdown and selecting **Go**. Clicking on the link in the **Contract/Blanket #** column will display the Contract.

Login Screen –
Contract & Bid Search

Advanced Search

Search for: ○ Bids ○ Contracts/Blankets

Exit

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Clicking the **Contracts and Bid Search** link displays the Advanced Search screen above. Selecting the button next to **Bids** will display a screen that enables you to search for Open and awarded Bids. Selecting the button next to **Contracts/Blankets** will display a screen that enables you to search for active Contracts.

Instructions for utilizing the Advanced Search feature are provided in the **Header Bar** section this training.

To login to the new eMaryland Marketplace, input your email address into the "Login ID" field and the password you were given by an administrator into the **Password** field. Next, either hit **Enter** on your keyboard or click the **Login** button. Note that neither your login ID or password is case sensitive.

The initial password you receive is temporary. The first time you login, you'll be asked to reset your password to something that only you know. Keep your password private, as your login ID and password constitute your electronic signature on documents you process within The new eMaryland Marketplace.

Homepage

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eMaryland Marketplace

Homepage – Role Selection

| Basic Purchasing | Department Access | Inquiry | Internal Administrator | Organization Administrator |

NIGP Code Browse | My Account | Customer Service | About   April 9, 2010 10:16:27 AM MST

Home   Items ▾   Documents ▾   Vendors ▾   Chris Harris

Home - Welcome Back Chris Harris

News(0) Reqs(0) Bids(3) PO(0) Approval(2) My Reminders(2) Events(0)

No News Available

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Once logged in, your Homepage will display. Depending upon the role you are currently in, your Homepage will appear differently. You are also limited to your current role's access and function privileges. Therefore, the first place you should look when you login is the role tabs along the top right of the screen to ensure that you are in a role that has access to the functions you would like to utilize.

If you have been given only one role, then no role tabs will appear.

Homepage –
Header & Navigation Bars

Home - Welcome Back Chris Harris

News(0) Reqs(0) Bids(3) PO(0) Approval(2) My Reminders(2) Events(0)

No News Available

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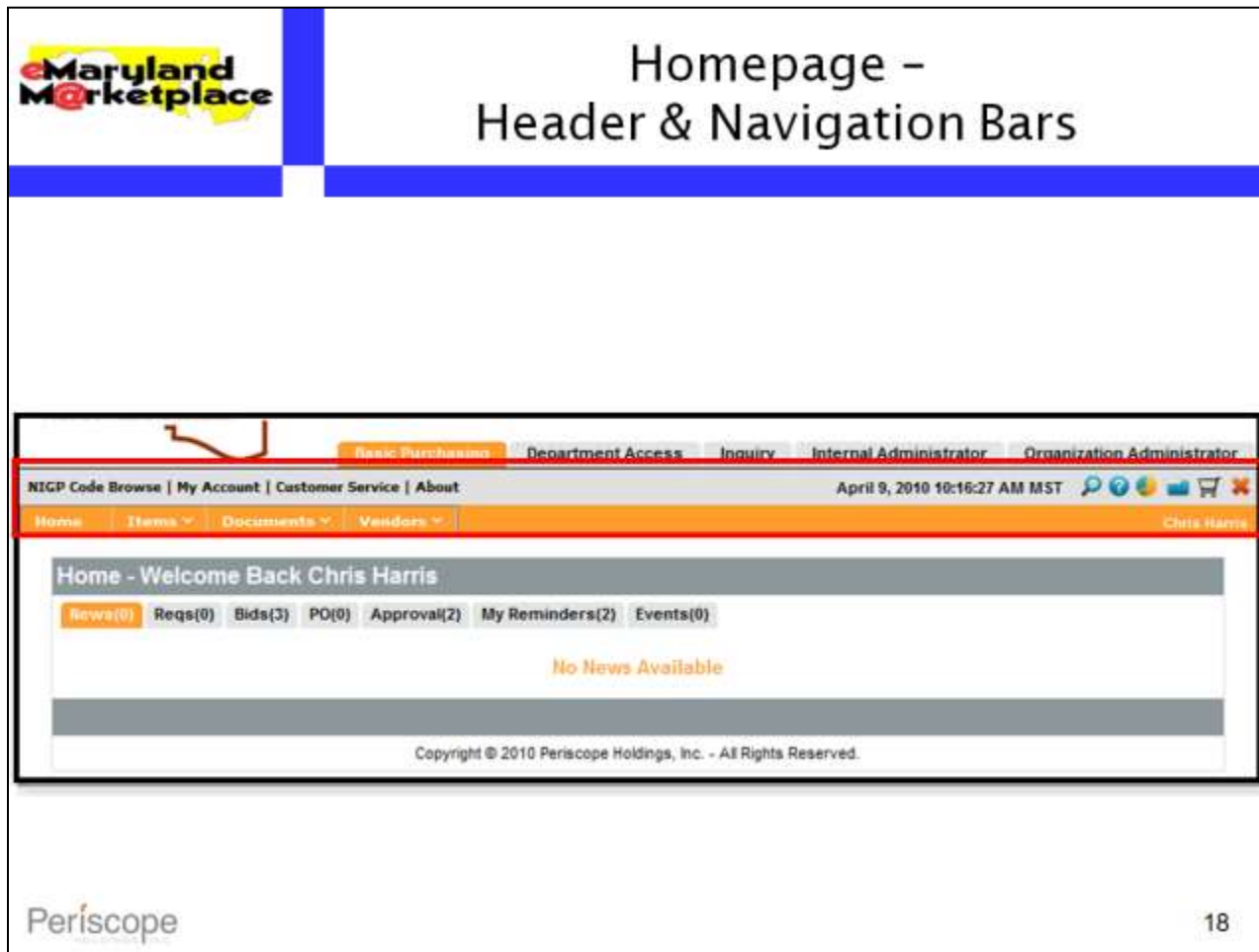
Also above your Homepage are the Header and Navigation Bars. These two horizontal bars are always present on the screen while you are logged in. They contain a series of links, icons and dropdowns enabling the user to access various types of information and documents within the system. The Header Bar also displays the official clock of the system. Selecting a link or icon from these bars will take you elsewhere in the application. This includes while you are working on a particular document. Therefore, it is important that you save any work before selecting any of these links or icons.
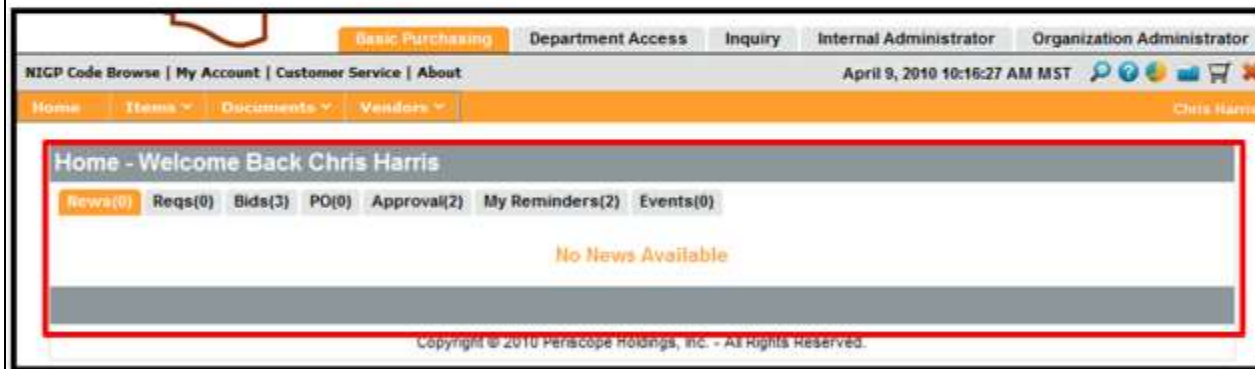
For non-administrative users, your Homepage consists of the area below the **Home – Welcome Back (Your Name)** label and features a series of tabs. Depending upon the non-administrative role you are currently in, your Homepage will feature different tabs. Each tab provides links to the most recent items and documents that may require user action. The number in parentheses within each tab is the total number of items within that tab that may require action.

Visible to all non-Administrative users on their Homepage, the News tab features general News and Information items created by administrators. It contains news bulletins that may apply to State users, vendors or both. These may be created by either the State Procurement Office or by your agency.

Selecting the link in the **News ID** column will display the **News Details** page regarding that item.

Visible to Department Access and Basic Purchasing users, the Reqs tab on the Homepage displays a set of sub-tabs representing each possible status of a Requisition that may require action from the user. Click on a sub-tab to see all of the Requisitions that you own currently in that status. The sub-tab will display the five most recent documents. If more than five documents are found, a 'View More' link will appear at the bottom to allow the user to see all documents in that status.

Selecting the link in the **Requisition #** column will display that Requisition and allow the user to continue processing the document.

Visible to Basic Purchasing users only, the Bids tab on the Homepage displays a set of sub-tabs representing each possible status of a Bid that may require your action. Click on a sub-tab to see all of the Bids that you own currently in that status. The sub-tab will display the five most recent documents. If more than five documents are found, a 'View More' link will appear at the bottom to allow the user to see all documents in that status.

Selecting the link in the **Bid #** column will display that Bid and allow you to continue processing the document.

Visible to Department Access and Basic Purchasing users, the PO tab on the Homepage displays a set of sub-tabs representing each possible status of a Purchase Order that may require your action. Click on a sub-tab to see all of the POs that you own currently in that status. A Change Order sub-tab also allows you to quickly find outstanding Change Orders that require processing. The sub-tabs will display the five most recent documents. If more than five documents are found, a 'View More' link will appear at the bottom to allow the user to see all documents in that status.

Selecting the link in the **Purchase Order #** column will display that PO.

Homepage – Approval Tab

Home - Welcome Back Chris Harris

News(0) Reqs(1) Bids(3) PO(1) Approval(4) My Reminders(2) Events(0)

My Documents Pending Approval

Bid #	Description	Bid Opening Date	Approval Requested	Approver	Approval Status	Date Approved	Approval Type
ADES10-00000100	test	04/16/2010 03:00:00 PM	04/09/2010 11:30:25 AM	Chris Harris	Waiting...		Pre-bid

Documents Pending My Approval

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
ADSPO10-00000155	11/23/2009	Carpeting	10	Open Market	System Administrator	ADSPO / SPO	$15,000.00
ADSPO10-00000054	11/05/2009	Elevator Maintenance	10	RPA	Chris Harris	ABA / ABA	$500.00

List & Approve

Bid #	Description	Purchase Method	Bid Opening Date	Dept/Loc	Purchaser	Total	Status
ADES10-00000100	test	Open Market	04/16/2010 03:00:00 PM	ADES / ADES	Cheryl Wynn	$10.00	Ready for Approval

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Visible to Department Access and Basic Purchasing users, the Approval tab on the Homepage potentially displays two sections The **My Documents Pending Approval** section lists the documents that you have submitted for approval that are still awaiting final approval, and The **Documents Pending My Approval** section lists the documents that have been submitted by other users that require your approval in order to proceed.

The sub-tab will display the five most recent documents. If more than five documents are found, a 'View More' link will appear at the bottom of the **My Documents Pending Approval** section to allow the user to see all documents in that status. Under the **Documents Pending My Approval** section, the 'List & Approve link' will be displayed to allow the user to see and take action on the documents as a group.

Selecting the document number link on the left side of the screen will open the document and allow you to view it. If your approval is required, you will be able to approve, disapprove or cancel the document.

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Visible to Department Access and Basic Purchasing users, the My Reminders tab on the Homepage will take users to the My Reminders screen. Reminders are items Department Access and Basic Purchasing users can create on certain documents they are able to access in order to remind either themselves or others of a task that needs to be completed regarding that document. Reminders can also be setup to send email notifications.

The My Reminders screen features a tab for each document that supports Reminders. Selecting on a tab will list the documents of that type that have reminders that have yet to be marked complete. Select the document number on the left side of the screen to view the document which has the reminder. You can also mark the reminder complete from this screen by selecting the calendar icon within the **Date Completed** column and selecting a date and then **Save & Exit** or **Save & Continue**.

Homepage –
Standard Button Options

My Reminders

Purchase Order(0)   Requisition(0)   Bid(2)   Quote(0)   Invoice(0)

Bid #	Due Date	Comment	Days Prior to Remind	Date Completed (MM/DD/YYYY)	Date Entered	Entered By
ADES10-00000000	04/01/2010	have a safe trip back to texas	0		03/31/2010 10:21:56 AM	Rita Schmidt
AD32PO10-00000005	04/05/2010	Remember to look at the Q&A for this Bid.	2		03/31/2010 10:22:00 AM	Chris Harris

ℹ Please save your changes before sorting table. Otherwise, your changes will be lost.

Save & Exit   Save & Continue   Reset   Cancel & Exit

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On screens throughout the application that enable you to make changes to a document or other information (like the My Reminders screen), you'll encounter one or more of the four button options circled.

• **Save & Exit** saves any changes that you've made on this screen and takes you back to the previous screen

• **Save & Continue** saves any changes that you've made on this screen and keeps you on the current screen

• **Reset** cancels any changes that you've made on this screen that haven't been saved

• **Cancel & Exit** cancels any changes you've made on this screen that haven't been saved and takes you back to the previous screen

Homepage – Events Tab

Visible to Basic Purchasing users only, the Events tab on the Homepage displays Contract and Blanket Purchase Orders that have reached milestones setup by administrators. Events can be setup to display Contracts/Blankets that are within a specified number of days of the created date, begin date or end date. They can also be setup to display Contracts/Blankets within a specified dollar amount of their total orderable amount.

Select the document number on the left side of the screen to view the document which has reached the event. You can also remove the document from this list by marking it complete from this screen by selecting the calendar icon within the **Completed Date** column and selecting a date and then **Save & Exit** or **Save & Continue**.

Homepage – Search Tab

Advanced Search

Search for: Module: Purchasing Module ▾ Document Type: ▾

Exit

Bids
Commodity Codes
Contract/Blankets
Items
Purchase Orders
Quotes
Requisitions
Vendors

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Visible to Inquiry users only, selecting the Search tab on the Homepage displays the Advanced Search feature. Instructions for utilizing the Advanced Search feature are provided in the **Header Bar** section of this training.

Header Bar

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The Header Bar is the gray bar that always appears along the top of screen. It contains a series of links and icons enabling the user to access various types of information within the system. The Header Bar also displays the official clock of the system. This date and time is used when time stamping documents and approvals, as well as managing solicitation available and opening times.

Samples of the NIGP Commodity/Services Code

Code Structure	Sample Code	Sample Description
3-Digit (Class) Code	620	Office Supplies: Erasers, Inks, Leads, Pens, Pencils, etc.
5-Digit (Class-Item) Code	620-80	Pens (General Writing Types): Ball Point, Nylon Tip, etc.
7-Digit (Class-Item-Group) Code	620-80-21	Pens, Ball Point, Retractable, Refillable, All Plastic Barrel W/Metal Pocket Clip
11-Digit (Class-Item-Group-Detail) Code	620-80-21-035-4	Fine Point, Black Ink, 12/Box
	620-80-21-045-3	Fine Point, Blue Ink, 12/Box
	620-80-21-065-1	Fine Point, Green Ink, 12/Box
	620-80-21-075-0	Fine Point, Red Ink, 12/Box
	620-80-21-095-8	Medium Point, Black Ink, 12/Box
	620-80-21-105-5	Medium Point, Blue Ink, 12/Box

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The National Institute of Governmental Purchasing (NIGP) Code is a coding structure utilized to standardize purchasing. The code is maintained and supported by Periscope and is widely used in the public sector. The chart displays a sample of the how the code is organized.

Every item that is requested, solicited and purchased within The new eMaryland Marketplace must be associated with at least a 5-digit NIGP Commodity Code.

Clicking the **NIGP Code Browse** link from the Header Bar allows you to either search for a specific code by keyword, or drilldown through the code by category. To utilize the search function pictured, type in a keyword to search by and select the **Search** button. You can filter your search by first selecting an NIGP Class and Class-Item from the dropdown boxes.

You can also browse and search through the NIGP Code when adding new items to any document.

The **NIGP Code Browse** area allows you to drilldown through the NIGP Code by categories of commodities. Clicking on the link in the **Code** column displays the codes underneath that category. You can click the **Show Categories** button to view the full list of categories again.

Clicking the **My Account** link from the Header Bar takes you to the **My Account Information** screen. This screen displays the contact information associated with your account. Click the **Edit** button to open up the **My Information** screen and edit any of this information. You can also edit the following fields:

• **Change Password** – Enables you to change the password you use to login to The new eMaryland Marketplace (You must type in the exact same password in the **Confirm Password** field to successfully change your password)

• **Login Question** – If you are unable to remember your password, you can select to be asked this login question. Provide the correct answer and your password will be emailed to the email address associated with your account.

• **Login Answer** – The answer to your login question that you must provide in order to have your password emailed to you.

• **Proxy User** – When activated, this user will be able to approve documents on your behalf. They will also receive the email notifications regarding the documents you must approve. This is generally used when someone will be unable to respond to email for an extended period, like during a vacation. This can also be set an administrator.

• **Default Homepage Tab for X (role)** – This field appears if you've got the Basic Purchasing, Department Access and/or Inquiry roles. Every time you return to your Homepage in that role, the tab selected will initially display.

• **User Manual Version –** Switch the version of the manual that will appear when clicking the **Help** icon.

Clicking the **Customer Service** link from the Header Bar displays a pop-up window with the State Procurement Office's The new eMaryland Marketplace website. This site contains information about the project to implement The new eMaryland Marketplace, training materials in the form of Reference Guides covering all aspects of The new eMaryland Marketplace, and contact information for the The new eMaryland Marketplace Help Desk.

Header Bar – About Screen

Clicking the **About** link from the Header Bar displays the version of the The new eMaryland Marketplace (aka BuySpeed Online) application that you are running.

Header Bar – Icons

Icon	Name	Description	Visible to
🔍	Advanced Search	Find any accessible document by various criteria.	• Department Access • Basic Purchasing • Inquiry
❓	Help	Open a help manual for the role currently selected.	• All roles
🟠	Administrative Reports	Choose from and run preset reports configured to be accessible by your current role.	• Department Access • Basic Purchasing • Inquiry
📁	Dashboard	Browse your documents by type and status from the last 180 days.	• Department Access • Basic Purchasing
🛒	G2B Punchout	Start a requisition for on-contract items that will route you to an external vendor website.	• Department Access • Basic Purchasing
✖	Logout	Logs you out of The new eMaryland Marketplace.	• All roles

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The icons visible on the right side of the Header Bar will depend on which role you are currently have selected. The table displays each icon, describes what functions they support and which roles can view them.
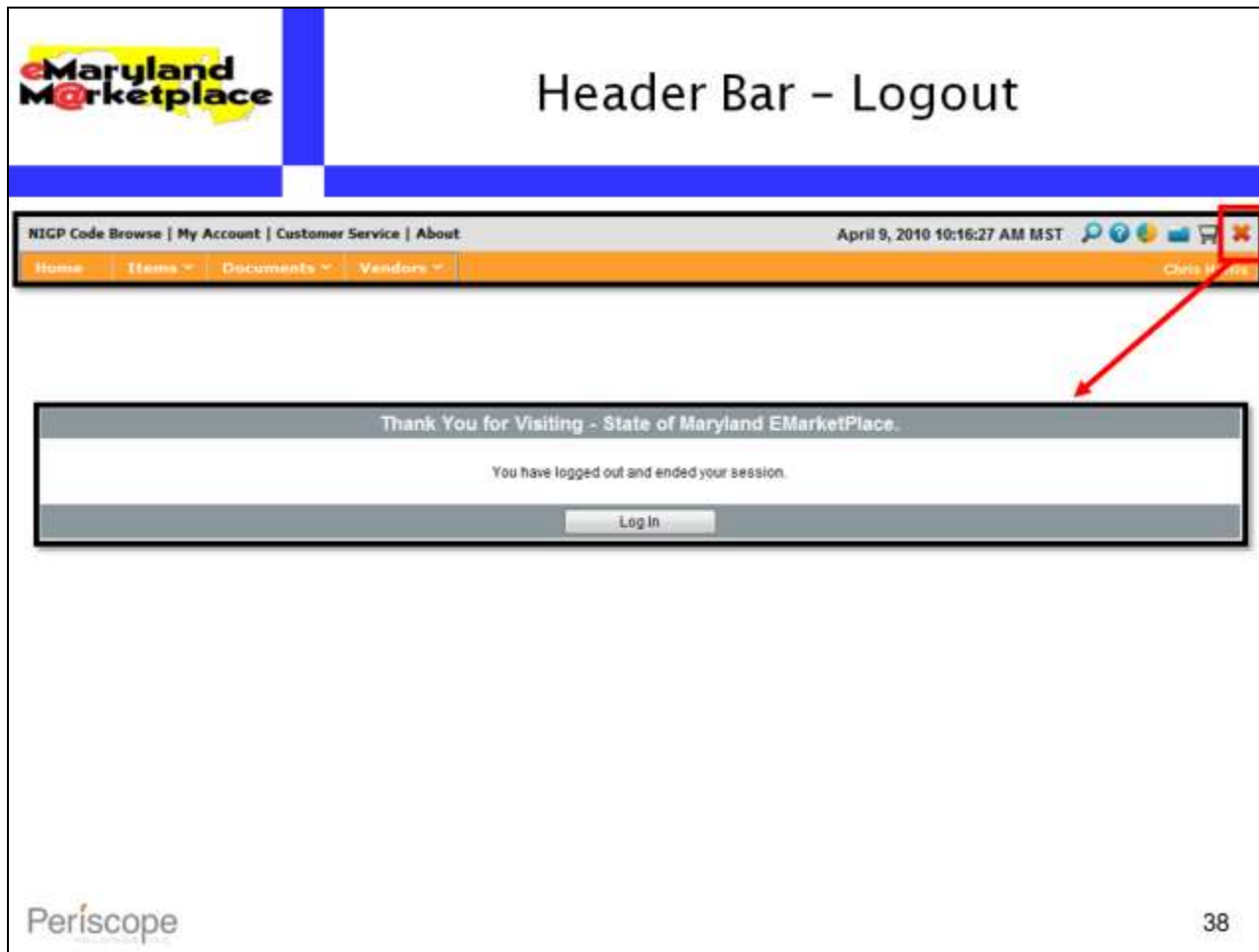
Clicking the **Logout** icon from the Header Bar will end your The new eMaryland Marketplace session. Select the **Log In** button to return to the Login Screen and re-enter The new eMaryland Marketplace.

If you are inactive in the system for 30 minutes, you will automatically be logged out upon clicking any link in the system.

Clicking the **G2B Punchout** icon from the Header Bar opens the **G2B Punchout Shopping** screen, enabling you to initiate a Requisition for items on-contract with a designated Punchout vendor. Punchout vendors allow you to access their ordering website via The new eMaryland Marketplace, and support the export of items selected on that site back into an official The new eMaryland Marketplace Requisition.

More information is provided in the **G2B Punchout** and **Requisition** training materials.

Clicking the **Dashboard** icon from the Header Bar opens up pop-up window displaying all of your Requisition, Bid and Purchase Order documents created within the last 180 days. Drill down by document type and then status to reveal links to the documents. Clicking on one of the links will open it in the The new eMaryland Marketplace window behind the pop-up.

Select **Close Window** to return to The new eMaryland Marketplace.

Header Bar –
Administrative Reports

Clicking the **Administrative Reports** icon from the Header Bar displays a list of reports that you can run. The reports that appear must be configured by an administrator to display to the role you currently have selected.

Selecting a report will open a pop-up window which allows you to enter the parameters available for the report. Once you've entered the desired parameters, select the icon of the format you would like the report to be export to and you will be prompted to name and save the resulting report to your computer.

Header Bar – Help Manual
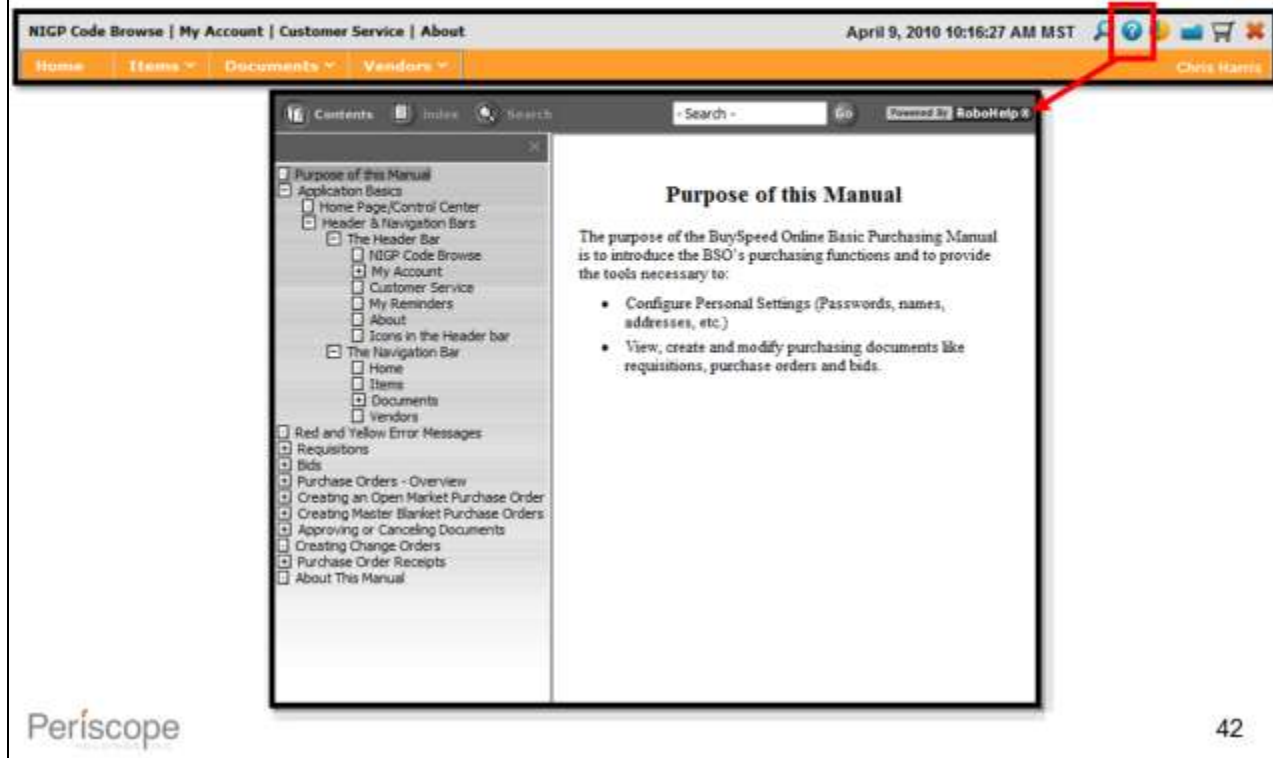
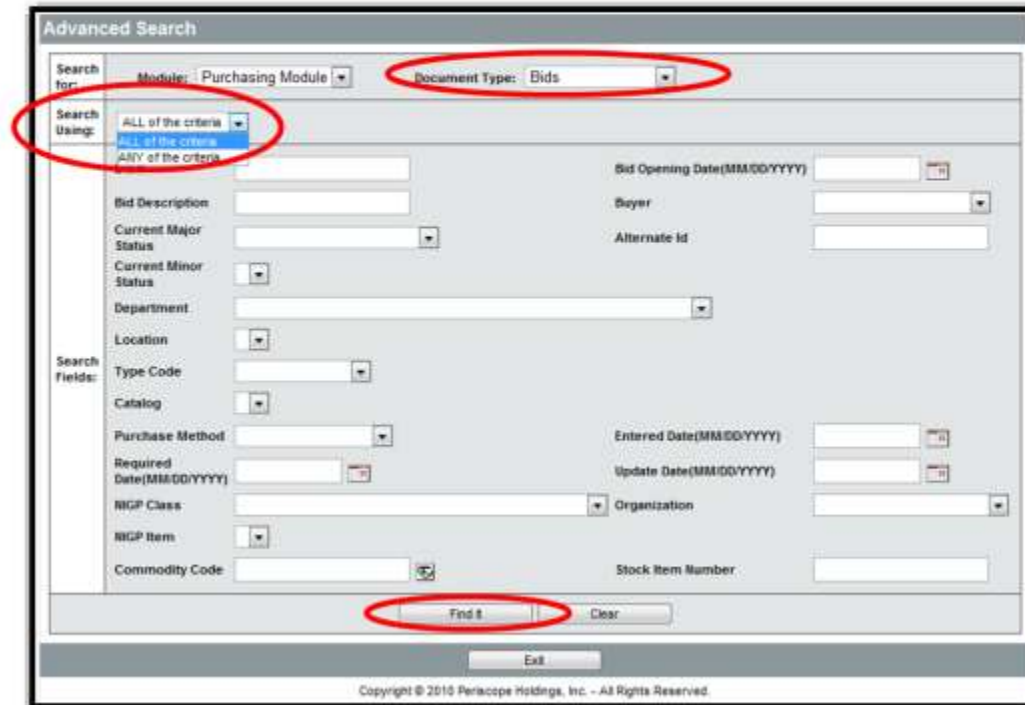Clicking the **Help** icon from the Header Bar opens a pop-up window with the Help Manual for BuySpeed Online. The information contained within the manual will be specific to the role that you currently have selected. In addition, the manuals cover functions standardized for all BuySpeed Online users, and is not specific to The new eMaryland Marketplace.
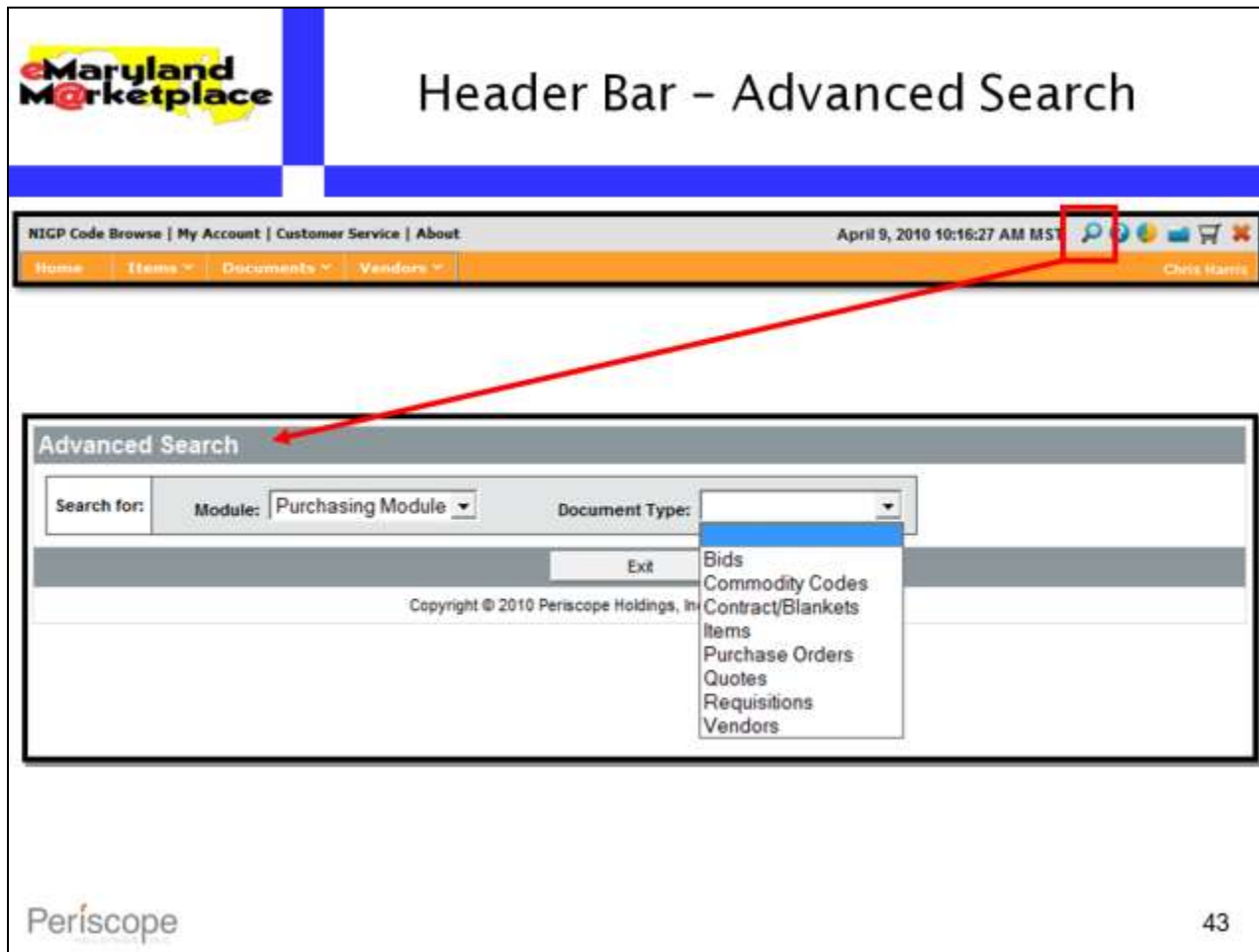
Clicking the **Advanced Search** icon from the Header Bar displays a screen that enables you to search for any document accessible to you by a variety of criteria. Currently, the State is only utilizing the Purchasing Module, so start by selecting what you would like to find in the **Document Type** dropdown box. In addition to documents, you can also search for registered vendors and any previously ordered items.

The **Advanced Search** feature can be extremely useful, particularly for finding the documents that do not display on your Homepage and/or that belong to other users within your Organization.

Header Bar –
Advanced Search (cont.)

After you've selected an option in the **Document Type** dropdown, a variety of search fields will appear based on the option you chose. Enter information about what you are searching for into one or more search fields and click **Find It** to have the matching results appear. For fields that support text, the system will display results that match only what you've typed. For instance, you can type in only part of a document number, and the all documents matching that part of the document number will be returned. Similarly, typing in just a single letter into the document description field would return all documents where that single letter appeared in any part of the description.

Depending upon what you are searching for, you may be able to click **Find It** without entering any information. This will return every item of that type. Generally, the fewer search fields you complete, the more results will be returned. To narrow your results, complete additional search fields and click **Find It** again.

Also note that a **Search Using** dropdown box appears. Use this field if your search is not returning any results. The default option in that field is **ALL of the criteria**, which ensures that results match all of the criteria you've entered. The other option is **ANY of the criteria**, which means that results will only have to match one of the search fields you've completed. This will usually return a greater number of results.

Header Bar – Standard Advanced Search Fields

Advanced Search Field	Description
Document #	The number auto-assigned to the document by The new eMaryland Marketplace.
Release Number	The number of an order off of a particular contract.
Alternate ID	The alternate identification number provided for the document.
Current Major Status	The current status of the document.
Document Description	The description provided for the document.
Organization / Department / Location	The business units provided for the document.
Entered Date	The date the document was created.
Item Description	The description of any item on the document.
Buyer	The Basic Purchasing user that owns the document.
Requestor	The user that created the corresponding Requisition document.
Purchase Method	The purchase method associated with the document.
NIGP Class / Item	The NIGP Code provided to any item on the document.
Vendor	The vendor associated with the document.

Browse by: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 10

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The standard Advanced Search fields are those normally visible when conducting an Advanced Search. They do not appear when searching for every document type however. The table describes each of these standard fields.

The **Browse By** search field may also appear depending upon what you are searching for. Clicking on a letter or number will display a list of results starting with either that letter or number.

Results for your **Advanced Search** will appear below the search fields. Select the document number on the left side of the screen to view the document. The other columns display additional information about the results.

As currently configured, only 25 items can display per page. Therefore, if your search returned more than 25 results, directly below the **Results** heading, the total number of results will display, along with the result numbers you are currently viewing and links to the screens where you can view the remaining results.

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Navigation Bar

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The Navigation Bar is the colored bar that always appears along the top of screen directly below the Header Bar. Non-administrative users can see dropdowns enabling the user to access items and documents, create new documents and contact vendors. Depending upon the non-administrative role you are currently in, your Navigation Bar will feature different dropdowns, however all roles will see a link back to the Homepage.

Organization Administrators will only see the link to the Homepage in the Navigation Bar.

Clicking the **Home** link from the Navigation Bar displays your Homepage. This link is always visible on screen, giving you constant one-click access back to your Homepage.

Visible to Department Access and Basic Purchasing users, the **Items** dropdown from the Navigation Bar displays the NIGP commodity categories which contain on-contract items available to order from active Contract/Blanket Purchase Orders within The new eMaryland Marketplace. Hovering your mouse over one of these categories will display the NIGP Classes to the right within that category that contain on-contract items to order.

Clicking on one of these NIGP Classes will display a screen containing a list of all the items within that Class which are orderable and allows you input a quantity to add to a new or existing Requisition. Further instructions for utilizing this feature are provided in the **Requisition** training materials.

Visible to Department Access, Basic Purchasing and Inquiry users, the **Documents** dropdown from the Navigation Bar displays a list of all major document types within the system, allowing you to access all of your documents, as well as all documents from your Organization that your role has access to. Hovering your mouse over any of the documents will display a list to the right of all available statuses of that document. For the documents that your current role is allowed to create, you will also see an option in the list labeled **New**.

Clicking **New** next to a particular document type will create a new blank "In Progress" document of that type. Clicking on any of the available statuses will display a list of your documents matching that document type and status. For Requisition and Purchase Orders, the different types of each document will be split amongst a series of tabs appearing along the top of the screen.

Initially, only your own documents will appear within the list. Selecting the **View All** button on the bottom of the screen will display all of the documents matching that type and status within your Organization.

Visible to Department Access and Basic Purchasing users, the **Vendors** dropdown from the Navigation Bar allows you to browse through the NIGP Code to view which vendors are registered with specific codes, as well as to search and find vendors by a variety of criteria for the purposes of sending them an email.

Selecting **Browse By Commodity Code** from the Vendors dropdown displays a screen with a list of all NIGP Code 3-digit Class codes. Clicking one of these Class codes will display the associated 5-digit Class-item codes. Selecting a 5-digit code will display a list of all the vendors registered with that code. Click on one of the vendor names to open a pop-up screen displaying that vendor's profile information. Clicking the **Drill Down** button on the bottom of the screen will re-display the list of NIGP 3-digit Class codes.

Selecting **Search** from the Vendors dropdown displays a screen allowing you to search for vendors using the same process as the **Advanced Search** feature. Upon clicking **Find It**, the vendors matching your search criteria will appear below in the **Results** section.

A **Select** column on the far left is available to select or de-select vendors to send an email. By default, all vendors matching your search criteria will be selected, even those appearing on successive pages if more than 25 results were returned. You can see the total number of vendors that were returned in the top right of the **Results** section next to the label **Total Selected**. Once you've got the vendors you wish to send an email selected, click the **Send Bulk Mail** button on the bottom of the screen.

Navigation Bar – Vendors (cont.)

Upon selecting **Send Bulk Mail**, the **Bulk Mail** screen will appear. This screen contains the fields necessary to complete an email to the selected vendors, including:

• **Additional Email Recipients** are other email addresses that should be carbon copied (cc'd) on the email. If you would like a copy of the email, you must enter your own email address in this field.

• **Subject** is the subject of the email.

• **Text** is the body of the email. This field does not support standard formatting, so it is recommended that you use this primarily to direct recipients to attached documents.

Within the **Attachments** section, you can select **Browse** to open a pop-up window allowing you to find a file on your computer to attach to the email. Once you've found and selected a file, click **Upload Attachment** to finalize attaching it. If you need to add more vendors as recipients to the email, click **Select Additional Vendors** to conduct another search and add more vendors. Once you're happy with the email and recipients, select the **Send** button.

Document
Navigation

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Document Navigation – Tabs

All documents within The new eMaryland Marketplace are organized in a similar fashion. Information on documents is input and accessed via a series of tabs along the top of the document. As information is input or edited on a tab, you must click **Save & Continue** on the bottom of the tab before proceeding to the next tab or navigating elsewhere in the system.

When starting a new document, you will start on the **General** tab, which is the far left tab. You will then need to complete any required fields on this tab before saving and moving to the next tab. Required fields are marked with an asterisk. At first, it is recommended that you click on each tab to ensure appropriate information is present. As you become more comfortable with the system, you will learn which tabs you can skip and which need have information input or edited.

Document Navigation – Summary Tab

The furthest right tab on all documents is the **Summary** tab. This tab displays all the information that was entered on the previous tabs, and contains options along the bottom that, depending on the status, allow you to perform certain actions against the document, including Clone, Cancel, Submit for Approval, Approve/Disapprove, Send and Print.

Whenever you access a previously created document, you'll initially be taken to the **Summary** tab. Vendors and external users are only able to access the **Summary** tab of documents created by the State.

If there is important information missing from your document, you will informed by validation warning and error messages along the top of your document. These messages will appear on the tab where the issue can be corrected, as well as on the **Summary** tab.

Validation warnings appear in yellow. The document can still be processed without correcting them. In the example shown, this user has not selected any vendors to notify about a Bid, therefore the warning "No bid bidder" displays.

Errors will appear in red. The document cannot be processed until errors are fixed. In the example shown, this user has not added any items to be bid upon to this Bid, therefore the error "No items" displays.

Along the top right of each primary document (Requisitions, Bids & POs) the status of the document displays in the top right corner, enabling you to quickly determine how far the document has progressed and what actions remain to be done.

In certain circumstances the status of individual items on a document can be different than the document as a whole. For instance, if Bid items are awarded at separate times, then some items will have progressed to an awarded status, while others will remain available for award. Similarly, if ordered items are received in separate shipments, then some items will have progressed to a received status, while others will remain outstanding.

In these circumstances, the document's status is driven by the status of its least progressed item, excluding items that have been cancelled. The status of individual items can be seen on the top right of each item's description in the **Item Information** section on the **Summary** tab.

Document Navigation – Document History

The icon that appears next to a document's status in the top right corner allows you to view the history of the document. Clicking the icon will produce a pop-up window detailing each status change of the document, including:

• **Status Date** is the date and time of the status change

• **Level** will display either "Header," meaning the change was to the entire document, or "Item," meaning the change was made to a single item

• **Item #** is the number of the item that had its status changed. If the entire document was changed "0" displays here

• **Major Status** is what status the document progressed to as a result of the change, and

• **User** is the user who made the status change